Creating and Accessing Records in DRIVE:

Start Edit New Case vs. Locate Case



Overview

The purpose of this document is to train and instruct users in the use of Start Edit New Case and Locate Case when creating and accessing records in the Indiana DRIVE application.

Start Edit New Case

Start Edit New Case is used by both the funeral director and the death medical certifier the first time they attempt to create or even access a record. For example, the funeral director uses Start Edit New Case to create a new death record. Doing so automatically grants them "ownership" of the Personal Data of the record and entitles them to legally Sign the record. When the death medical certifier then attempts to access the record they must also use Start Edit New Case as it is a new case for them. They select Start Edit New Case, enter the same data entered by the funeral director and select the Search button. This search is necessary to prevent the creation of duplicate records. Upon selecting the Search button the case started by the funeral director will appear in the Search Results. The medical certifier then selects the case and is given the opportunity to become responsible for the Medical Data of the record. It is this acceptance of ownership that grants them the legal authority to Certify the death.

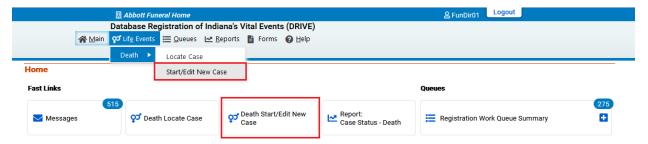
Locate Case

Once the case has been started and the user, either the funeral director or the death medical certifier, has become an "owner" of the record they may then use Locate Case to access and edit the record as needed. NOTE: Locate Case will not work to retrieve records until the user has used Start Edit New Case to start and become owner of the record.

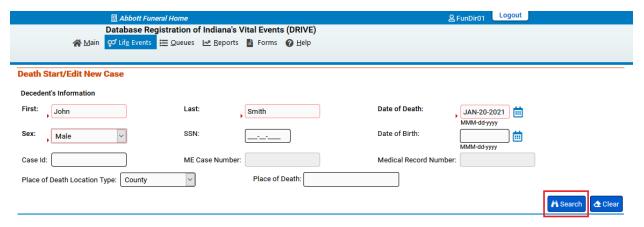
Detailed instructions follow.

The Funeral Director Starts the Death Record

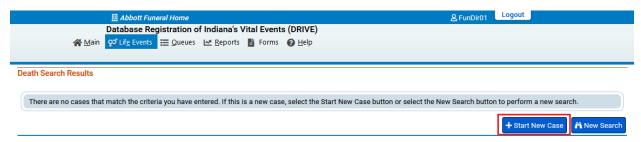
1.) The funeral director logs into DRIVE and selects Life Events -> Death -> Start Edit New case. Note that they may also use the "Death Start/Edit New Case" Fast Link on the Home page.



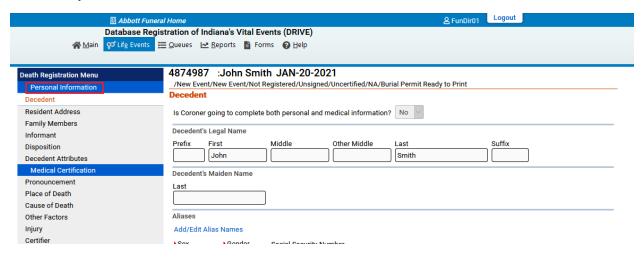
2.) The funeral director completes the required fields, highlighted in red and noted by red arrows, and selects the Search button.



3.) If no matching records are returned the funeral director selects the Start New Case button.

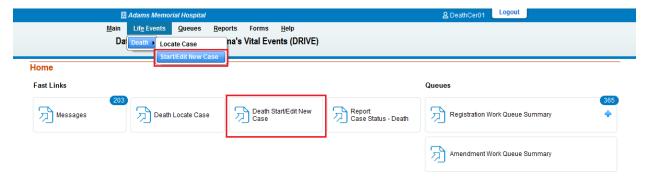


5.) The Decedent page is displayed and the funeral director is now the "owner" of the death record Personal Data. Upon completion and successful validation of all the Personal Information pages the funeral director is able to legally Sign the death record. Also, they may now use the **Locate Case** feature to access the record.

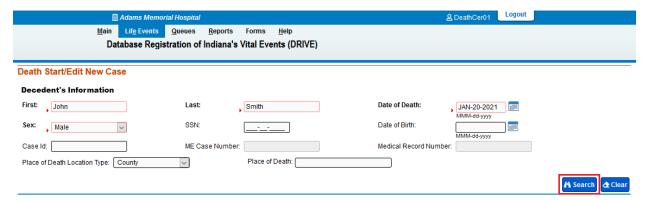


The Death Medical Certifier Accesses the Record for the First Time

6.) The death medical certifier logs into DRIVE and selects Life Events -> Death -> Start Edit New case. Note that they may also use the "Death Start/Edit New Case" Fast Link on the Home page.



7.) The death medical certifier completes the required fields, highlighted in red and noted by red arrows, using the same data as entered by the funeral director and selects the Search button. This Search is required to prevent the creation of duplicate records.



8.) As the case has already been started by the funeral director it will appear in the Death Search Results screen. The medical certifier then selects the Decedent's Name link to access the record.



9.) However, before the medical certifier can access and edit the record, they must assume responsibility for the medical certification by selecting the OK button on the pop-up message.



10.) Upon selecting OK the Decedent page is displayed and the medical certifier becomes the owner of the Medical portion of the record. Upon completion and successful validation of all the Medical Certification pages the death medical certifier is able to legally Certify the death record. Also, they may now use the **Locate Case** feature to access the record.

